## Help for You

There are four main security roles in the UltiPro system. These roles are Employee, Manager, Timekeeper and Employee Administrator. This Learning Path is designed for the manager role at the Salvation Army.

**Just getting set up in UltiPro?** View *Learning Path – All Employees* to orient yourself to UltiPro

**New to the Manager role?** See steps 1-4.

**Are you looking for a review?**
- **I need help managing employee requests for time off and timesheet entries?** See steps 2-18.
- **I need help approving timesheets at pay period end?** See steps 19-22.
- **I need help with managing employee pay, personal information changes?** See steps 23- 27.

To access the hotlinks in the table below, hover over the link, press *ctrl* button and click your mouse. To go directly to the Manager job aids page click here.

| What do you want to do? | Print instructions (PDF) | Demonstration Video |
|---|---|---|
| 1. How can I get an overview of what Managers do in UltiPro? | **UltiProTask and Role Access Chart** | **Overview for Managers and Timekeepers (view on site)** |
| 2. Show me tips about entering and approving time off requests. | **Time Entry Tip Sheet** | Demonstration of timesheet entry, reset dates and approvals |
| 3. How do I view/approve/reject employee time off requests in UltiPro Time and Attendance? | **How to Respond to Time Off Requests** | Responding to Time Off Requests in UltiPro |
| 4. I can't see the Time and Attendance screens. | **How to turn off Pop-up blockers** | |

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|---|---|---|
| 5. How and when are PTO balances updated? | **PTO Balance Synchronization Schedule** | |
| 6. How do I add an employee absence to an employee's timesheet? | **How to Update a Timesheet with an Absence** | How to enter absences and overtime on behalf of an employee (view on site) |
| 7. How do I enter overtime on an employee's timesheet? | **How to Enter Employee Overtime Hours** | How to add overtime hours |
| 8. How do I add work hours to a casual employee's timesheet? | **How to Add Hours for Casual Employees** | |
| 9. How do I add premiums and flat dollar premiums to an employee's timesheet? | **Adding a premium** | Adding a premium |
| 10. Show me a list of the time off codes and the premium codes. | **Time Off Codes and Premium Codes List** | |
| 11. How do I add/edit statutory holiday hours? | **Adding Statutory Holiday Hours** | |
| 12. How do I edit stat holiday date to ensure a weekend employee is paid stat pay? | **Revising a holiday date** | |
| 13. How do I adjust employees past records for hours, rates, or paid time off? | **Payroll Adjustments** | |
| 14. How do I use Multiview Scheduler (MVS) to create and maintain a team's work schedule? (**Note:** this tool is for those ministry units with very complex shift scheduling) | **Using MVS Scheduler** | |
| 15. How do I use Simple Scheduler to create/modify a shift schedule? | **Creating employee and team schedules** | |
| 16. How can I add/modify a shift or shift pattern? | **Changing Shifts and Shift Patterns** | Adding Shifts |
| 17. How do the Manager and Employee Administrator add/manage an employee's secondary job(s)? | **Adding and Managing Secondary Jobs** | |
| 18. How do I add hours for secondary jobs? | **Adding time for a secondary role (multiple jobs)** | Adding Time for a Secondary Job |

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|---|---|---|
| 19. How can I check a pay period and identify unapproved timesheet entries? | **Checking for Unapproved Timesheets** | |
| 20. How do I approve employee time worked at the end of a pay period? | **How to Approve Employee Timesheets** | Approving Timesheets |
| 21. How do I create and print a report in Time and Attendance? | **Producing Reports** | |
| 22. How do I temporarily delegate my Time and Attendance duties? How do I act as proxy for someone else? | **Assigning a proxy for time approvals (delegating during vacation)** | Delegating Duties: Time and Attendance |
| 23. Describe the employee information change approval process between the employee administrator and employee manager. | **Authorizing Employee Additions and Changes** | Applying Employee Profile Changes |
| 24. How can I print a pay statement for an employee? | **How to Print Employee Pay Statement** | |
| 25. How can I print employee tax slips? | **How to Print Employee Tax Slips** | |
| 26. How can I create a report on employee pay or personal information? | **Creating Reports on Employee Records** | |
| 27. How do I have someone else take my role to change/approve employee changes while I am away? | **Delegating Employee Change Approval Duties** | |